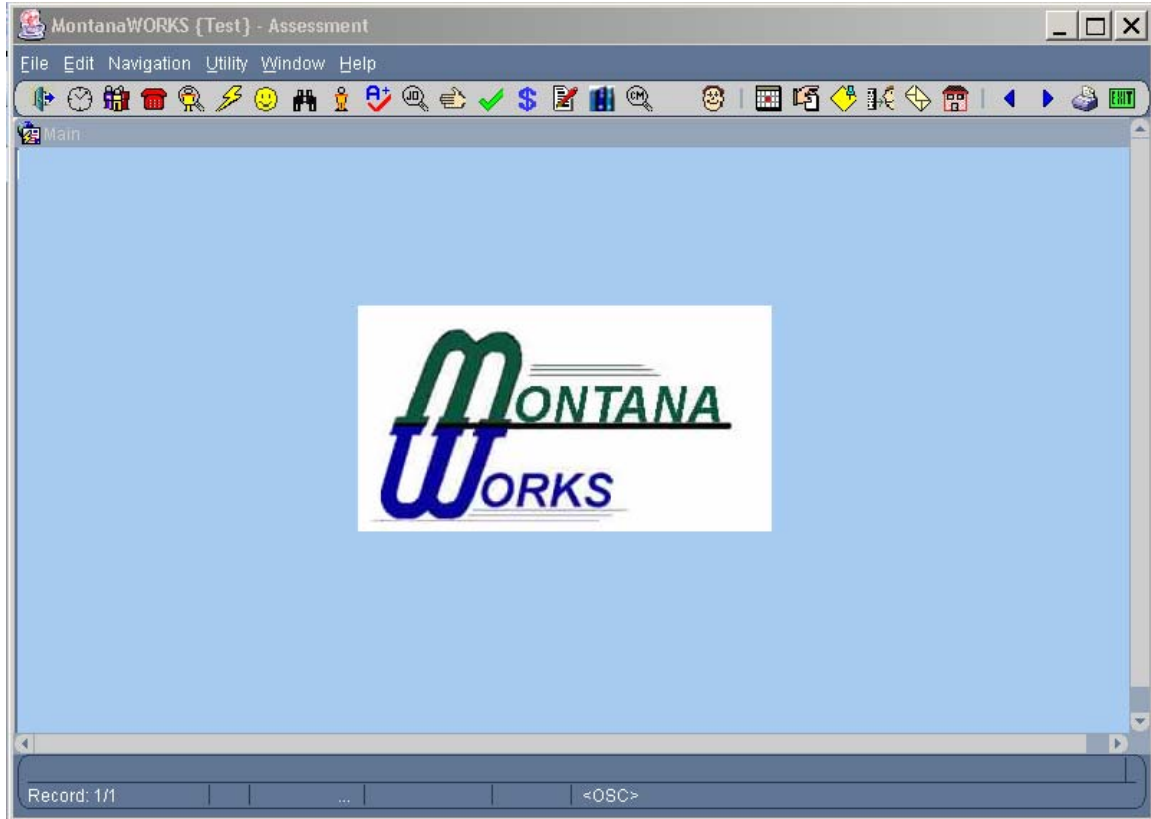



## **Eligibility Screens**

**In this section you will do the following:**

- **Complete an Application for WIA**
- **Determine Eligibility for WIA**
- **Enroll a participant in WIA**

## Splash Screen



To navigate to the Eligibility Screens, click on the  eligibility screen icon.

## Eligibility Screens Application Tab

MontanaWORKS [Test] - Eligibility

File Edit Navigation Options Utility Window Help

Eligibility - BRENT PAYTON(999-06-2848) | Lynda Schuldheisz (406)728-3710

Application Eligibility Waiver ATAA Enrollment

Birth Date: 12/10/1990 UI Status: Created Dt:

How many family members related by blood or marriage live in your household? # of dependents 18 and under:

What is the approximate total household earned income of these family members? Per Month

U.S. Citizen? Yes If No Alien Registration #: Are you authorized to work in the U.S.?

Currently Employed? Not Employed If Yes, are you at risk of losing your current level of income?

Registered With Selective Service? If Yes, Registration #: Selective Service

Do you have a disability that is a barrier to employment? No

Are you homeless? No If Yes, live in shelter?

Are you a Dislocated Worker? If Yes Letter from employer? Layoff Date Employer / Company name?

Are you receiving or have you received in the past 6 months: Food Stamps?

Are you currently receiving Public Assistance? (TANF,GA,SSI,RAC,etc.)

Was the customer unable to achieve self-sufficiency after receiving core services?

What is your employment objective?

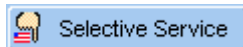
What is your employment or training need?

Print You Completed Dt: Record 1 of 0 Add Save Cancel

How many family members related by blood or marriage live in the seeker's household?

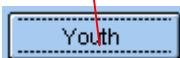
Record: 1/1 <OSC>

Complete this screen and **Save** when you are done! All fields are required.



This button will take you to the Selective Service website.

### ***For Youth Applicants!!***



Click on the **Youth** button.

(This will only show up when the applicant is age 14-21.)

The following screen for Additional Youth Application Questions.

All questions must be answered.

Additional Youth Application Questions

Are you pregnant or parenting?	Yes	Are you a Native American?	No
Are you a High School Graduate or Do you have a GED?	No	Are you in the juvenile justice system?	No
Are you a High School Dropout?	No	Do you lack Vocational/Employment Goal?	Yes
Are you a runaway?	No	Are you below average grades?	Yes
Are you an offender?	No	Do you have poor work history?	Yes
Are you basic skills deficient?	Yes	Have you been fired in last 6 months?	No
Are you currently a foster child?	No		
Are you a migrant youth?	No		
Are you aged out of foster care at 18?	No		
Are you a child of an incarcerated parent?	No		
Are you limited English proficient?	No		
Do you lack occupational goals/skills?	Yes		
Are you disabled (including learning)?	No		
Do you need assistance to complete an educational program, or to get and keep a job?	Yes		
Are they one or more grade levels below that appropriate for their age?	Yes		

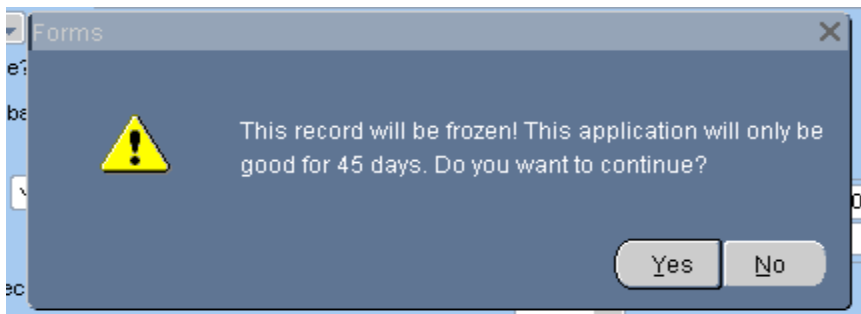
Close

**Close** when you are done answering these questions.

After you **Save** the **Application Tab**, you must then double click in the Completion Date field. This will freeze the application and will be good for 45 days.

*Be sure to double check the screen to make sure it is correct before you Freeze the screen! Otherwise you will have to complete a new application!!*

You will get this message:

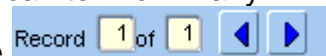


Click Yes to freeze application.

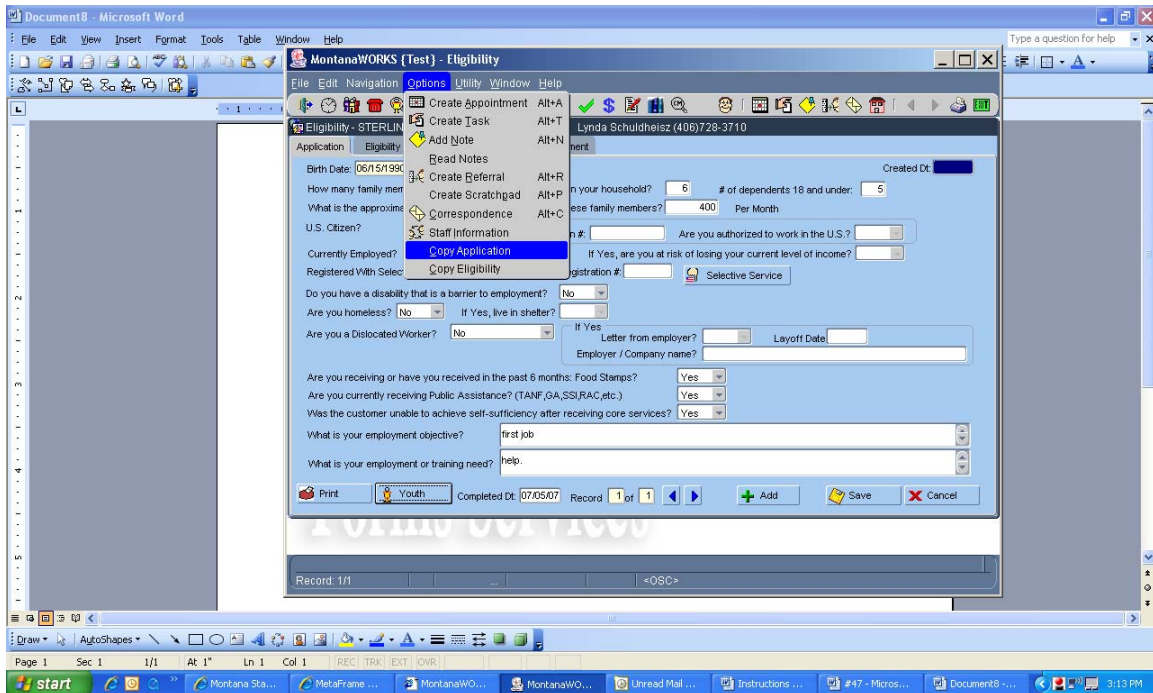
Again, once the application has been frozen, you will not be able make changes. If you find that you made a mistake or information changes, you can create a new application by clicking on the **+ Add** button. This will create a new application for you to complete.

- After you click on the ADD button, go to the 1<sup>st</sup> record and that is your new application.

The system will look at the most recent application. You can tell how many applications are there for the participant by looking at the section at the bottom of the screen.



You can also create a new application by using the “Copy Application” function. This is in under Options in the menu bar.



You will be able to copy the prior application exactly like it is and then make the changes you need to make.

You will still have to **Save** and Freeze the application.

## Eligibility Screen

### Eligibility Tab

File Edit Navigation Options Utility Window Help

Eligibility - SUSIE HOMEMAKER(999-06-8266) | Carol Evanger (406)542-5763

Application Eligibility Waiver ATAA Enrollment

**Eligibility**

**Personal**

Date of Birth: 10/25/1969

US Citizen: Yes

Alien Registration #: A

Disability Status: Not Disabled

HH Have Dep Child(<18): Yes

Single Parent: Yes

Limited English: No

**Status**

Vet Status: N - None

Employment Status: Not Employed

UI Claim Status: Neither Clai...

Current Education Status: Not Attendin...

Highest Grade Comp: High School...

Dislocated Worker: No

ST Displaced Homemaker: Yes

Homeless: No

**VMA**

Income: \$

Food Stamps in last 6 months: No

Receiving TANF: No

Receiving SSI/SSDI: No

Receiving GA/RCA/SSI: No

Family Size: 3

Semi-Annual Income: 3,000

Annual Income: 6,000

Low Income Adult/Youth: ☒

Adult 80% Self Sufficiency:

Registered - Selective Service:

Service #:

Waiver:

WIA Adult ☒

WIA Youth ☐

Barriers ☒

Out-of-School ☒

**WIA Dislocated Worker**

WIA Dislocated Worker ☐

Category:

Layoff Date:

**State Displaced Homemaker**

State Displaced Homemaker ☒

Current Month/Year: 09/2007

Income: 500

Meets All Definitions: Yes

**NAFTA / TAA / Trade Act 2002**

NAFTA / TAA / Trade Act 2002 ☐

Petition #:

Impact Date:

Layoff Date:

Tenure Months:

Trade Waiver:

No Petition ☐

Check Verification ☒

App Completed Date: 09/26/07 Eligibility Verif Date:

Record 1 of 1

Add Save Cancel

Complete this screen and **Save**!

When you put data into the sections that you are trying to make the seeker eligible for, the checkbox will turn green.

- WIA for Adult
- WIA Dislocated Worker for dislocated workers
- WIA Youth for youth

For Dislocated Worker, in the NAFTA/TAA Trade Act 2002 section, if you are not a TAA program operator, and there is no TAA petition, you should CHECK the No Petition checkbox.

If the person is not receiving any sort of public assistance and you are enrolling them into the Adult, DW, or Youth Program, you must complete the **Income** button (under the WIA section). This is to show low income.

Youth, go to **page 8 and 9**.

Adult/Dislocated Worker go to **page 10**.

## For Youth Applicants

You must double check the Barriers Pop-Up under Youth Section.

MontanaWORKS [Test] - Eligibility

File Edit Navigation Options Utility Window Help

Eligibility - BRENT PAYTON(999-06-2848) | Lynda Schuldheisz (406)728-3710

Application Eligibility Waiver AFAP Enrollment

Eligibility

Personal ☐ Date of Birth: 12/10/1990 US Citizen: Yes Alien Registration #, A Disability Status: Not Disabled HH Have Dep Child(<18): No Single Parent: No Limited English: No

Status ☐ Vet Status: Employment Status: UI Claim Status: Current Education Status: Highest Grade Comp: Dislocated Worker: No Displaced Homemaker: No Homeless: No


VMA ☐ Income Food Stamps in last 6 months: Yes Receiving TANF: Yes Receiving SSI/SSDI: No Receiving GA/RCA/SSI: No Family Size: 4 Semi-Annual Income: Annual Income: ☒ Low Income Adult/Youth Registered - Selective Service: Service #: Waiver: VMA Adult ☐ VMA Youth ☒ Barriers ☐ Out-of-School

VMA Dislocated Worker ☐ Category: Layoff Date: State Displaced Homemaker ☐ Current Month/Year: Income: Meets All Definitions: NAFTA / TAA / Trade Act 2002 ☐ Petition #: Impact Date: Layoff Date: Tenure Months: Trade Waiver: ☐ No Petition

Check Verification

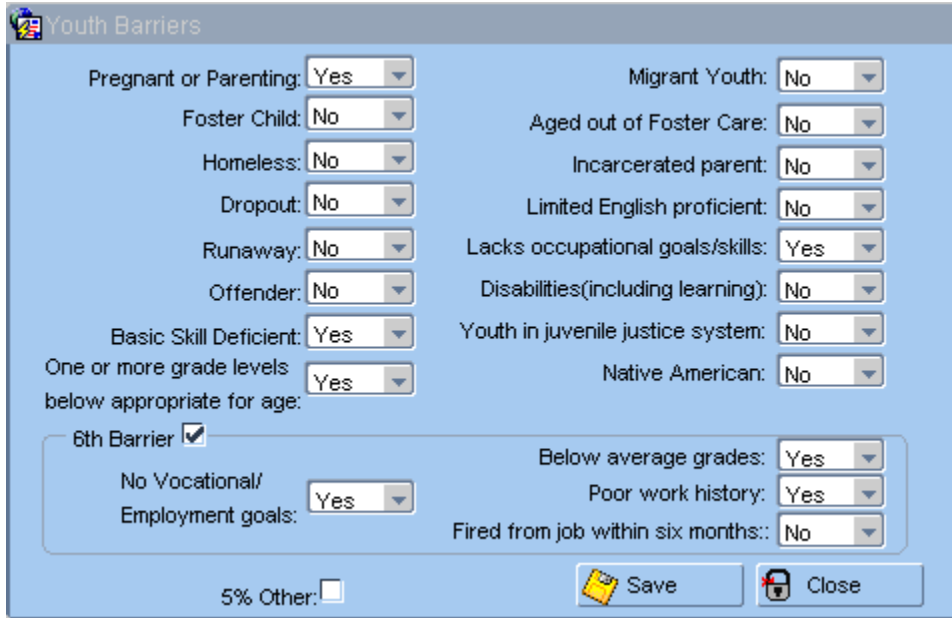
Print Youth Completed Dt: 07/02/07 Record 1 of 1 Add Save Cancel

Record: 1/1 <OSC>

Click on the  Barriers button.



The following Youth Barriers Screen will pop-up:



The screenshot shows a software window titled "Youth Barriers". It contains a grid of dropdown menus for various categories. The categories and their current values are as follows:

Category	Value
Pregnant or Parenting:	Yes
Foster Child:	No
Homeless:	No
Dropout:	No
Runaway:	No
Offender:	No
Basic Skill Deficient:	Yes
One or more grade levels below appropriate for age:	Yes
Migrant Youth:	No
Aged out of Foster Care:	No
Incarcerated parent:	No
Limited English proficient:	No
Lacks occupational goals/skills:	Yes
Disabilities(including learning):	No
Youth in juvenile justice system:	No
Native American:	No
6th Barrier (checkbox):	Checked
No Vocational/ Employment goals:	Yes
Below average grades:	Yes
Poor work history:	Yes
Fired from job within six months::	No
5% Other:	Unchecked

At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Close" (with a red X icon).

This screen populates from the Application. Double check the answers and Save and Close.

Eligibility Screen  
**Eligibility Tab**  
Income button:

This screen will pop up after you click on the **Income** button under WIA on the **Eligibility Tab**.

When you have the \*Last Month highlighted, you can then complete the income for that month.

1. Type in Last Month as MM/YYYY.
2. Double click on Income Type and it will display a list of types of income from which to choose – Earned Income is the one for wages.
3. When you have entered all the income for that month, you can use the **Copy** button to copy to the next month.
4. Save when you are done!
5. **Close** after saving!

Even though Dislocated Workers do not have income verification, you must click on the **Income** button and **Save**. You do not need to complete the pop up box.

## Eligibility Screen

### Eligibility Tab Cont.

File Edit Navigation Options Utility Window Help

Eligibility - SUSIE HOMEMAKER(999-06-8266) | Carol Evanger (406)542-5763

Application Eligibility Waiver ATPA Enrollment

**Eligibility**

**Personal**

Date of Birth: 10/25/1969

US Citizen: Yes

Alien Registration #A:

Disability Status: Not Disabled

HH Have Dep Child(<18): Yes

Single Parent: Yes

Limited English: No

**Status**

Vet Status: N - None

Employment Status: Not Employed

UI Claim Status: Neither Clai...

Current Education Status: Not Attendin...

Highest Grade Comp: High School...

Dislocated Worker: No

ST Displaced Homemaker: Yes

Homeless: No

**WIA**

**Income**

Food Stamps in last 6 months: No

Receiving TANF: No

Receiving SSI/SSDI: No

Receiving GA/RCA/SSI: No

Family Size: 3

Semi-Annual Income: 3,000

Annual Income: 6,000

☒ Low Income Adult/Youth

Adult 80% Self Sufficiency:

Registered - Selective Service:

Service #:

Waiver:

☒ WIA Adult

☐ WIA Youth

☒ Barriers

☒ Out-of-School

**WIA Dislocated Worker**

Category:

Layoff Date:

State Displaced Homemaker: ☒

Current Month/Year: 09/2007

Income: 500

Meets All Definitions: Yes

NAFTA / TAA / Trade Act 2002: ☐

Petition #:

Impact Date:

Layoff Date:

Tenure Months:

Trade Waiver: ☐ No Petition

☒ Check Verification

App Completed Date: 09/26/07 Eligibility Verif Date:

Record 1 of 1

+ Add

Save

Cancel

The Semi Annual and Annual income will be displayed when you complete and Save the **Income** button screen.

Notice that the WIA Adult check box is now green and the Low Income box is CHECKED. This is all done automatically for you if the applicant is considered low income.

This applicant is possibly eligible for the Adult and State Displaced Homemaker programs.

Eligibility Screen  
**Eligibility Tab**  
 Check Verification Button

The screenshot shows a software application window titled 'Eligibility - SUSIE HOMEMAKER(999-06-8266) | Carol Evanger (406)542-5763'. The 'Eligibility' tab is selected. The form is divided into several sections:

- Personal:** Date of Birth (10/25/1969), US Citizen (Yes), Alien Registration # (A), Disability Status (Not Disabled), HH Have Dep Child(<18) (Yes), Single Parent (Yes), Limited English (No).
- Status:** Vet Status (N - None), Employment Status (Not Employed), UI Claim Status (Neither Clai...), Current Education Status (Not Attendin...), Highest Grade Comp (High School...), Dislocated Worker (No), ST Displaced Homemaker (Yes), Homeless (No).
- WMA:** Income (500), Food Stamps in last 6 months (No), Receiving TANF (No), Receiving SSI/SSDI (No), Receiving GA/RCA/SSI (No), Family Size (3), Semi-Annual Income (3,000), Annual Income (6,000), Low Income Adult/Youth (checked), Adult 80% Self Sufficiency ( ), Registered - Selective Service ( ), Service # ( ), Waiver ( ), WMA Adult (checked), WMA Youth ( ), Barriers ( ), Out-of-School (checked).
- WMA Dislocated Worker:** Category ( ), Layoff Date ( ), State Displaced Homemaker (checked), Current Month/Year (09/2007), Income (500), Meets All Definitions (Yes), NAFTA / TAA / Trade Act 2002 ( ), Petition # ( ), Impact Date ( ), Layoff Date ( ), Tenure Months ( ), Trade Waiver ( ), No Petition ( ).

At the bottom, there are buttons for 'App Completed Date: 09/26/07', 'Eligibility Verif Date: ', 'Record 1 of 1', '+ Add', 'Save', and 'Cancel'. A red arrow points to the 'Check Verification' button.

After you have completed all of the fields on the screen, **Save** the screen and click on the **Check Verification** button.



Takes you to the Selective Service website.

Eligibility Screen  
**Eligibility Tab**  
Check Verification Button:

You have to gather documentation for eligibility and retain it in the case file just like usual. This screen provides you a checklist of the items you need for eligibility.

**For Youth Applicants:** An additional Youth tab will appear and you must check the appropriate items on that tab! See page 14.

You CHECK the boxes that you have the eligibility documentation for and **Save**.

You have to **Close** the screen after you save.

This will take you back to the **Eligibility Tab**. The programs that the person is eligible for will be checked as well as green.

## For Youth Applicants

MontanaWORKS {Test} - Eligibility

File Edit Navigation Options Utility Window Help

General Youth

☐ **Pregnant or Parenting**  
(-ie. Physician's Note, Birth Certificate, School Records)

☐ **Foster Child**  
(-ie. Written Statement, Court documentation)

☐ **Homeless**  
(-ie. Written statement from shelter or individual)

☐ **Dropout**  
(-ie. Attendance Record, Statement from school)

☐ **Runaway**  
(-ie. Written Statement, Court documentation)

☐ **Offender**  
(-ie. Court documents, Letter from Probation Officer)

☐ **Basic Skill Deficient**  
(-ie. Generally Accepted Standardized Test School Records)

☐ **One or more grade levels below appropriate for age**  
(-ie. Generally Accepted Standardized Test School Records)

☐ **Youth at Risk**  
(-ie. Statement from Agency, applicant/parent statement)

☐ **Foster Care**  
(-ie. Written statement State/local agency)

☐ **Incarcerated Parent**  
(-ie. Court documents)

☐ **School Behavior Problems**  
(-ie. School Records)

☐ **Family Literacy problems**  
(-ie. Applicant Statement/Parental Statement)

☐ **Domestic Violence**  
(-ie. Statement from school, mental health or medical provider or parental statement)

☐ **Substance Abuse**  
(-ie. Statement from substance abuse treatment, medical or mental health provider)

☐ **Limited English Proficient**  
(-ie. School assessment)

☐ **Lack Occupational goals/skills**  
(-ie. School records/assessment, Applicant statement)

☐ **Chronic Health-Disabilities**  
(-ie. Statement from medical, mental health, provider, school special education dept)

Save Cancel Close

Record: 1/2 <OSC>

Page 10 Sec 1 10/12 At Ln Col REC TRK EXT OVR

start Montana State Empl... MetaFrame Present... 3 Citrix ICA Client ... Instructions with Scr... Document2 - Microso... 10:28 AM

You must also complete the **Youth Tab** if you are enrolling a Youth.

## Eligibility Screen

### Eligibility Tab

MontanaWORKS [Test] - Eligibility

File Edit Navigation Options Utility Window Help

Eligibility - MARCUS R SIMONSON(999-06-1448) | Suzanne Ferguson (406)444-4513

Application Eligibility Waiver ATAA Enrollment

Eligibility

Personal ☒ Date of Birth: 02/23/1981 US Citizen: Yes Alien Registration #: A Disability Status: Not Disabled HH Have Dep Child(<18): No Single Parent: No Limited English: No

Status ☒ Vet Status: Not a Veteran Employment Status: Not Employed UI Claim Status: Neither Clai... Current Education Status: In-School, P... Highest Grade Comp: 14 Dislocated Worker: Yes Displaced Homemaker: No Homeless: No

VMA ☒ Income: 3,000 Food Stamps in last 6 months: No Receiving TANF: No Receiving SSI/SSDI: No Receiving GA/RCA/SSI: No Family Size: 1 Semi-Annual Income: 3,000 Annual Income: 6,000 ☒ Low Income Adult/Youth Registered - Selective Service: Yes Service #: 11-1111111-1 Waiver: VMA Adult ☒ VMA Youth ☐ Barriers ☐ Out-of-School

VMA Dislocated Worker ☒ Category: Individual layoff Layoff Date: 04/25/07 State Displaced Homemaker ☐ Current Month/Year: Income: Meets All Definitions: NAFTA / TAA / Trade Act 2002 ☐ Petition #: Impact Date: Layoff Date: Tenure Months: Trade Waiver: ☒ No Petition

Check Verification

App Completed Date: 05/08/07 Eligibility Verif Date: 05/08/07 Record 1 of 1 Add Save Cancel

Double click in the Eligibility Verification Date field and then **Save**.

You will get this message:

Forms

This record will be frozen! Do you want to continue?

Yes No

Click **Yes** and your eligibility information will be frozen. If you have conflicting information from the application to the eligibility tabs the system will alert you.

Now, you are ready to enroll your participant into a program(s).  
Eligibility Screen


## Enrollment Tab


This is the place where you will actually enroll the participant into the program.

The top section “Possible Enrollments” are programs that the seeker may be referred to. Double click in the “Program” field for a list of values.

The Eligible Enrollments section (below the “Possible Enrollments”) is where WIA and other DLI programs will appear. The left side is where programs from the eligibility screen will populate. You will not be able to search in this section. It auto-populates!

The right side is where other DLI programs such as PRA, TAA, and NEG will be chosen to enroll a participant. Double click in the first field and it brings you a list of programs.

To enroll in a program, put a check mark in front of the desired enrollment and then click the  button. The actual enrollments will appear at the bottom of the screen.

You have until Midnight of the day you enrolled the participant to “De-enroll” a participant from a program. To do this, click on the  Oops! button.